Learn how to create and edit notification policies as well as set up print notifications. To access this screen, sign in Service Configuration, open the WMS Circulation left navigation, select Notifications and Receipts, and then select the Notification Policies link.

Use the Notification Policies screen to configure notifications to be sent to patron when they have bills, holds, schedules, overdue items, or recalled items.

- Notifications are sent via email.
- The content of the notification is generated at the moment the email is sent. Changes to the Notification Policies will be reflected in emails to patrons if the email was sent after the change was saved.
- The system sends the following notifications hourly at the top of the hour:
  - Hold Expiry Notifications
  - Hold Pickup Notifications
  - Schedule Expiry Notifications
- All other notifications are sent by the system daily at 7:00 am local time. Local time is based on the time zone set on the Open Hours screen in the WorldCat Registry module.
- For patrons that do not have email addresses, the system will automatically generate print notification. For more information, see Print notifications, below.
- Libraries using Tipasa should work with their interlibrary loan department to evaluate the library's Tipasa notification settings and determine whether to use notifications from WorldShare Circulation or from Tipasa. This will prevent patrons from receiving multiple notifications for items about to be due, overdue or available for pickup.

Create or edit notification policies

1. On the Notification Policies screen, click Create New, or click the Policy Name you want to edit.
2. On the Create New or Edit Policy screen, enter a description of the policy.
3. Enter a description of the policy.
4. Select a Notification Type from the list.

### Notification Types - Table

<table>
<thead>
<tr>
<th>NOTIFICATION TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| Bill Notification  | Use to notify patrons that they have accrued bills.  
<p>|                   |  - You can configure the notification to be sent out after a set amount is reached. |</p>
<table>
<thead>
<tr>
<th>NOTIFICATION TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| Hold Pickup Notification | Use to notify patrons that their hold is ready for pickup.  
- The notification is queued to be sent once the item has been checked in to fulfill the hold. An item can be checked in when it is returned, or when staff check the item in from the Pull report and Clear hold shelf.  
- Used in Hold Fulfillment Policy. |
| Hold Request Expiry Notification | Use to notify patrons that their hold request expired before an item was found to fulfill the request or was deleted.  
- The notification is queued to be sent once the hold request expires (the hold is no longer active in the system) or was deleted by a staff member. For more information on deleting holds, see Delete a hold from the item record and Delete a hold from a patron account.  
- Used in Hold Request Policy. |
| Hold Shelf Expiry Notification | Use to notify patrons that their hold has expired (has been pulled from the hold shelf).  
- The notification is queued to be sent once the item has expired from the hold shelf (the patron failed to pick up their hold during the time set in the Hold Shelf Period).  
- Used in Hold Fulfillment Policy. |
| Schedule Expiry Notification | Use to notify patrons that their scheduled item has expired.  
- The notification is queued to be sent after a scheduled item has expired (the patron did not check out the item during the scheduled time).  
- Used in Scheduling Policy |
<p>| NOTIFICATION TYPE                  | DESCRIPTION                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |</p>
<table>
<thead>
<tr>
<th>NOTIFICATION TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Room Schedule Placed Notification</td>
<td>Use to notify patrons that their room event has been scheduled.</td>
</tr>
<tr>
<td></td>
<td>◦ The notification is queued to be sent once an event has been created for a room.</td>
</tr>
<tr>
<td></td>
<td>◦ Used in Room Scheduling.</td>
</tr>
<tr>
<td>Room Schedule Expiry Notification</td>
<td>Use to notify patrons that their room reservation has been canceled.</td>
</tr>
<tr>
<td></td>
<td>◦ The notification is queued to be sent after the cancellation occurs.</td>
</tr>
<tr>
<td></td>
<td>◦ Used in Room Scheduling.</td>
</tr>
<tr>
<td>Room Schedule Reminder Notification</td>
<td>Use to notify patrons that they have a room reservation.</td>
</tr>
<tr>
<td></td>
<td>◦ The notification is queued to be sent before the event occurs.</td>
</tr>
<tr>
<td></td>
<td>◦ Used in Room Scheduling.</td>
</tr>
<tr>
<td>Suspension Notification</td>
<td>Use to notify patrons about suspension activity.</td>
</tr>
<tr>
<td></td>
<td>◦ The notification is sent hourly to any patrons that have had suspension time added in the previous hour.</td>
</tr>
<tr>
<td></td>
<td>◦ Suspension notifications include details about the suspension-related events and the patron’s suspended-until date.</td>
</tr>
<tr>
<td></td>
<td>◦ Used in Patron Type Policy.</td>
</tr>
<tr>
<td>Automatic Checkin Receipt Notification</td>
<td>Use to notify patrons that their item has been checked in.</td>
</tr>
<tr>
<td></td>
<td>◦ The notification is queued to be sent once the item has been checked in.</td>
</tr>
<tr>
<td></td>
<td>◦ Used in the Additional Patron Notifications.</td>
</tr>
<tr>
<td>Automatic Due Date Receipt Notification</td>
<td>Use to notify patrons of their item due date.</td>
</tr>
<tr>
<td></td>
<td>◦ The notification is queued to be sent once the item has been checked out.</td>
</tr>
</tbody>
</table>
5. Enter a **Subject**.

6. Enter **Start Text**.
   - Do not enter more than 500 characters.
   - The system generates a list of items, based on the **Notification Types**, which appear between the start and end text.
   - **Optional**. Include your institution's name and contact information.

7. Enter **End Text**.
   - Do not enter more than 500 characters.
   - **Optional**. Include your institution's name and contact information.

8. Select a **Default Delivery Method** from the list.
   - Email is the only available method at this time.
   - The system sends emails from **no-reply@oclc.org**.

9. Select when you would like to send the notification.
   - This option is not available for Schedule Pickup Notifications or Schedule Placed Notifications.
   - For Loan Overdue Notifications, you can select to send notifications before the event occurs.

10. For Bill Notifications, enter an **amount** to trigger when the notification is sent.

11. **(Optional)** To add additional notifications to the policy, click the **Add button**.

12. **(Optional)** Click **Print Preview** to view the layout of the print notification. Print preview displays only the output of the first notification (Notification 1). For more information on printing notices, see **Print notifications**, below.

13. Click **Save**.

To activate a notification policy for automatic email receipts, open the **WMS Circulation** left navigation, select **Notifications and Receipts**, and then select the **Additional Patron Notifications** link. Under the Automatic Email Receipts heading, select the appropriate notification policies.

**Copy notification policies**

1. Click the **Policy Name** you want to copy.
2. In the top right corner, click **Copy**. The copied policy appears.
3. Enter a policy name and edit any additional fields.
4. Click **Save**.
Delete notification policies

Policies cannot be deleted if they are in use.

1. Click the Policy Name you want to delete.
2. In the top right corner, click Delete.
3. On the Confirm window, click OK.

Print notifications

The following applies to all Notification Types:

- Printed notifications will be created for any patron account that does not contain an email address. For more information, see Set up print notifications, below.
- Printed notifications use the standard regional paper size as its single default format:
  - A4 (210 x 297 mm): Australia, Europe, South Africa, New Zealand
  - Letter (8.5 x 11 inches): United States, Canada
- The default format accommodates the most commonly available windowed envelope in each region.

Set up print notifications

In order to set up notifications for printing you need:

- The WMS Circulation API, available on the OCLC Developers Network
- A valid WSKey. For more information on WSKeys and how to request one, see Authentication and Authorization

For information on how to create an application for managing print notifications, see the solution guide Notification Management Application.

Notification translations for multilingual WMS groups

Configure the below Notification Policies with custom translations for all primary languages used by group aware libraries. When an email notification is generated, the system will use the translation that matches the language preference of the patron's home library.

To use this feature, at least one member library must select a different language or country in the Currency and Locale settings of the WorldCat Registry.

Translations are optional. If no translation exists, the notification will be delivered using the default language. Translations will not apply to printed receipts, emails sent manually from the staff interface, or print notices created for patrons without an email address. The default translation of the printing/sending institution will be used.

1. On the Notification Policies screen, click the Policy Name to add a translation.
2. On the Edit Policy screen, select the additional language tab.

3. Select the **Activate** setting to send notifications in this language if it matches the language preference of the patron's home library.

4. Enter the translated text for **Subject**, **Start Text**, and **End Text**.

5. Select a **Default Delivery Method** from the list.
   - Email is the only available method at this time.
   - The system sends emails from no-reply@oclc.org.

6. Select when you would like to send the notification.
   - This option is not available for Schedule Pickup Notifications or Schedule Placed Notifications.
   - For Loan Overdue Notifications, you can select to send notifications before the event occurs.

3. Click **Save**.

Note: The following notification types are always sent by the patron’s home library. At this time, translated text can be provided in Service Configuration but will not be used by the system:

- Bill Notification
- Hold Request Expiry Notification
- Suspension Notification

**Related policies:**

Notification Policy is used in:

- **Hold Request Policy**
- **Hold Fulfillment Policy**
- **Loan Policy**
- **Patron Type Policy**
- **Scheduling Policy**